

**Appointment Change Action – Employee Subgroup**










- Purpose** Use this procedure to change an employee's **Employee subgroup** to hourly when the position's **Employee subgroup** is set to monthly or change the **Employee subgroup** to monthly when the position's **Employee subgroup** is set to hourly.
- Trigger** The Employee subgroup of a position is set to monthly and the employee who is in the position is to be compensated at an hourly rate or the position is set to hourly and the employee is to be compensated at a monthly rate.
- Prerequisites**
- Contact the Payroll Office **prior to** initiating the Appointment Change Action.
    - All future time entries made in the Cross-Application Time Sheet (CATS) should be removed before the PA Processor begins the action.
    - If this is not done, the Payroll Office is unable to make any corrections in CATS and the PA Processor must delete the action.
- End User Roles** In order to perform this transaction you must be assigned the following role:  
Personnel Administration Processor

| Change History |                                                                                              |
|----------------|----------------------------------------------------------------------------------------------|
| Date           | Change Description                                                                           |
| 7/22/2009      | Added additional information in the Prerequisites, Helpful Hints, and Comment sections.      |
| 2/10/2012      | Updated selection screen screenshot                                                          |
| 5/14/2014      | Updated Next Increase description field.                                                     |
| 5/28/2014      | Updated screen shot of <i>Planned Working Time</i> , added note to Work Schedule rule field. |

**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions


**Transaction Code** PA40

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type                                                                                                                                                                                  | Description                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Error</b><br>                                                                                             | <b>Example:</b>  Make an entry in all required fields.<br><b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.                                                     |
| <b>Warning</b><br>                                                                                           | <b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.<br><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed. |
| <b>Confirmation</b><br> or  | <b>Example:</b>  Save your entries.<br><b>Action:</b> Perform the required action to proceed.                                                                                                                                                                                     |

**Procedure**


1. Start the transaction using the above menu path or transaction code **PA40**.

Personnel no.  

From

| Action Type                  | Personn... | EE group | EE subgr... |
|------------------------------|------------|----------|-------------|
| New Hire                     |            |          |             |
| Change of Status             |            |          |             |
| Concurrent Employment        |            |          |             |
| Appointment Change           |            |          |             |
| Quick Hire                   |            |          |             |
| Rehire - Quick Hire          |            |          |             |
| Separation                   |            |          |             |
| Rehire                       |            |          |             |
| Leave of Absence - Active    |            |          |             |
| Leave of Absence - Inactive  |            |          |             |
| Return from Leave of Absence |            |          |             |

2. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name                                            | R/O/C | Description                                                                                                                                                                                                                                                                        |
| Personnel no.                                         | R     | The employee's unique identifying number.<br><b>Example:</b> 40000136                                                                                                                                                                                                              |
| From                                                  | R     | The effective date of the action.<br> Only enter the <i>From</i> date if you are the Personnel Administration Processor initiating the appointment change action.<br><b>Example:</b> 07/16/2009 |

3. Click the box to the left of  to select.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

**Personnel Actions**

Personnel no. **40000136**



Name **ALLEN TOM**

PersArea **5400** Employment Security Dept EEGroup **0** Permanent

PSubarea **00FT** Agencywide EESubgroup **05** H-OT Elig>40hrs/wk Status

From **7/16/2009**

| Action Type                  | Personnel... | EE group | EE subgr... |
|------------------------------|--------------|----------|-------------|
| New Hire                     |              |          |             |
| Change of Status             |              |          |             |
| Concurrent Employment        |              |          |             |
| <b>Appointment Change</b>    |              |          |             |
| Quick Hire                   |              |          |             |
| Rehire - Quick Hire          |              |          |             |
| Separation                   |              |          |             |
| Rehire                       |              |          |             |
| Leave of Absence - Active    |              |          |             |
| Leave of Absence - Inactive  |              |          |             |
| Return from Leave of Absence |              |          |             |

4. Click  (Enter) to validate the information.
5. Click  (Execute) to execute the action.

Infotype Edit Goto Extras System Help

**Copy Actions (0000)**

Execute info group Change info group

Pers.No. 40000136  
 Name ALLEN TOM  
 PersArea 5400 Employment Security Dept EEGroup 0 Permanent  
 PSubarea 00FT Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active  
 Start 07/16/2009 to 12/31/9999

**Personnel action**  
 Action Type U3 Appointment Change  
 Reason for Action 62 Change in EE Subgroup





**Status**  
 Employment 3 Active


**Organizational assignment**  
 Position 70074101 TAX SPEC 3 PT  
 Personnel area 5400 Employment Security Dept  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk

**Additional actions**

| Start Date | Act. | Action Type | ActR | Reason for action |
|------------|------|-------------|------|-------------------|
|            |      |             |      |                   |


6. Complete the following fields:


| R=Required Entry O=Optional Entry C=Conditional Entry |       |                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name                                            | R/O/C | Description                                                                                                                                                                                                                                                                                                                                                                          |
| Reason for Action                                     | R     | <p>It stores the reason that an action has been performed.</p> <p> Click the  (Matchcode) to open the selection list.</p> <p><b>Example:</b> 62 – Change in EE SubGroup</p>                                    |
| Employee subgroup                                     | R     | <p>A sub-division of Employee Group which defines work period designation and salary rate unit.</p> <p> Click the  (Matchcode) to open the selection list.</p> <p><b>Example:</b> 06 M-OT Elig&gt;40hrs/wk</p> |

7. Click  (Enter) to validate the information.



















The following Warning Message will appear:

 Person and position have different employee groups/subgroups




. Continue to click  (Enter) until prompted to save.

8. Click  (Save) to save.

Infotype Edit Goto Extras System Help

### Copy Organizational Assignment (0001)


   **Org Structure**

Personnel No.  Name   
 PersArea  Employment Security Dept EEGroup  Permanent  
 PSubarea  Agencywide EESubgroup  H-OT Elig>40hrs/wk Status   
 Start  to


**Enterprise structure**

CoCode  STATE OF WASHINGTON  
 Pers.area  Employment Security Dept Subarea  Agencywide  
 Cost Ctr  DEFAULT AGENCY 54 Bus. Area  Employment Security Depart  
 Fund

**Personnel structure**

EE group  Permanent Payr.area  Semi-monthly  
 EE subgroup  M-OT Elig>40hrs/wk Contract  


**Organizational plan**

Percentage   **Assignment**  
 Position  2743  
 Job key  173L  
 Exempt  TAX SPECIALIST 3 - ES  
 Org. Unit  780800  
 Org.key  VANCOUVER DTO

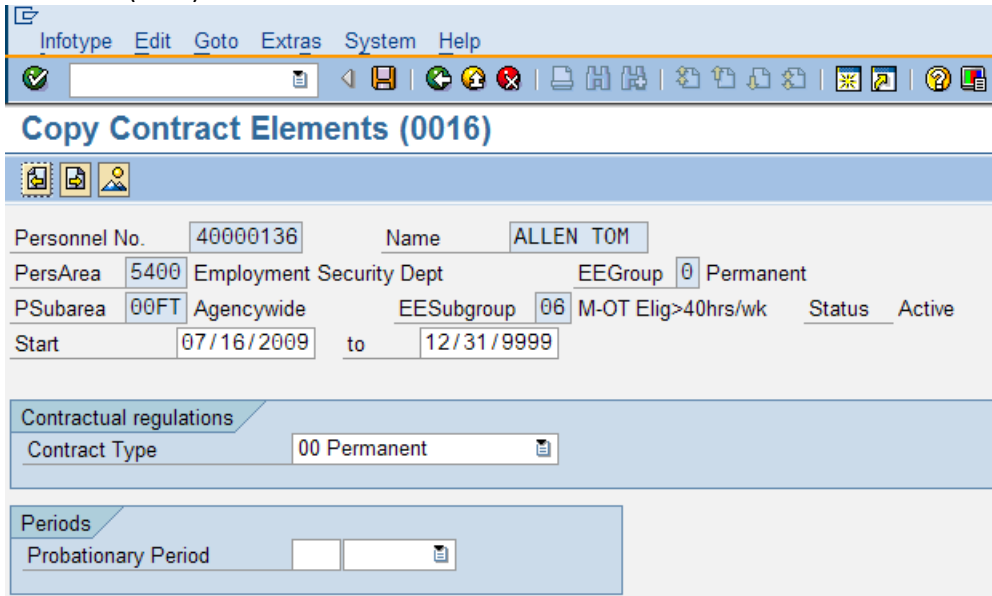
**Administrator**

PersAdmin   
 Time  PERMANENT PART-TIME  
 PayrAdmin

9. Review the infotype and update as required.

10. Click  (Enter) to validate the information.

11. Click  (Save) to save.



**Copy Contract Elements (0016)**

Personnel No. 40000136 Name ALLEN TOM

PersArea 5400 Employment Security Dept EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999


**Contractual regulations**

Contract Type 00 Permanent

**Periods**

Probationary Period

12. Review the infotype and update as required.

13. Click  (Enter) to validate the information.

14. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Planned Working Time (0007)**

Work schedule

Personnel No. 40000136 Name ALLEN TOM  
 PersArea 5400 Employment Security Dept EEGroup 0 Permanent  
 PSubarea 00FT Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 07/16/2009 To 12/31/9999

**Work schedule rule**

Work schedule rule FULL 5-8s: M-F 8 hpd  
 Time Mgmt status 9 9 - Time evaluation of planned times  
☐ Part-time employee Additional time ID


**Working time**

Employment percent 100.00  
☐ Dyn. daily work schedule  
 Daily working hours Min. Max.  
 Weekly working hours 0.00 Min. Max.  
 Monthly working hrs 0.00 Min. Max.  
 Annual working hours 0.00 Min. Max.  
 Weekly workdays



**Additional fields**

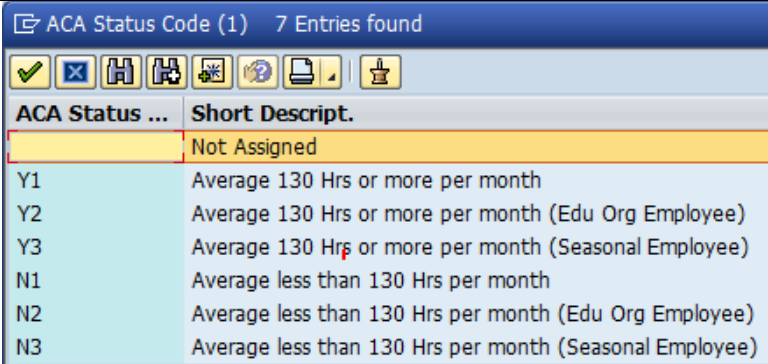

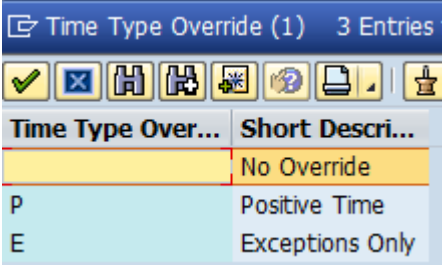
ACA Status Code Not Assigned  
 Time Type Override No Override


15. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name                                            | R/O/C | Description                                                                                                                                                                                                                                                                                                                                                                                               |
| Work schedule rule                                    | R     | <p>A description of the duration and composition of employee working time for any given workday.</p> <p> <b>Note:</b><br/>           The new record will default to <b>FULL</b> in this field. You will need to select the appropriate work schedule if the employee is not on a FULL 5-8s M-F 8hpd work schedule.</p> |



|                    |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    |   | <b>Example:</b> FULL 5-8s M-F 8 hpd                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Time Mgmt status   | R | <p>This is part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule.</p> <p><b>Example:</b><br/>           1-Time Evaluation of actual times - Use for Hourly employees<br/>           9-Time Evaluation of planned times - Use for Monthly employees</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Part-Time Employee | O | Select the indicator <b>only</b> if the employee should be designated as Part-Time.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Additional time ID | R | <p>The indicator on how employee leave will accrue</p> <p><b>Enter:</b></p> <ul style="list-style-type: none"> <li>▪ <b>00</b> for full <b>normal</b> leave accrual (will default to normal if field is left blank).</li> <li>▪ <b>01</b> for <b>NO</b> leave accrual</li> <li>▪ <b>02</b> for sick leave accrual only</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Employment percent | R | <p>The amount of time that an employee works per week in a particular position and is described in terms of a percentage.</p> <p><b>Example:</b> 100.00</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| ACA Status Code    | C | <p>Used to select the average hours per month over the next 12 months, for the employee. Click on the match code to display the options:</p> <p> <b>Note:</b><br/>           Effective January 1, 2014 this is a <b>required</b> entry for <b>all new hires, rehires</b> and employees who experience a change in employment status. <b>DO NOT</b> leave the default code of "Not Assigned". Press <b>F1</b> in this field for additional information.</p> <p> <b>Tip:</b><br/>           When a schedule change is keyed for an employee that has an ACA code, agencies <b>must</b> enter or update the ACA Status Code to reflect the employee's change of status.</p> |

|                    |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    |   |  <p><b>Example:</b> Y1 – Average 130 Hrs or more per month</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Time Type Override | C | <p>This field is the time reporter override and applies <b>only</b> to agencies using, or planning to use the Time Leave and Attendance system (TLA).</p> <p> <b>Tip:</b><br/>This entry is an override code. Updating this field is optional and only required if the agency needs to override the general timesheet requirements of an employee. Press <b>F1</b> in this field for additional information.</p>  <p><b>Example:</b> P Positive Time</p> |

16.  Click (Enter) to validate the information.

17.  Click (Save) to save.

Infotype Edit Goto Extras System Help

**Copy Date Specifications (0041)**



Personnel No. 40000136 Name ALLEN TOM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999

| Date Specifications     |            |
|-------------------------|------------|
| Date type               | Date       |
| 01 Anniversary Date     | 05/21/1987 |
| 03 Original Hire Date   | 05/21/1987 |
| 05 Seniority Date       | 05/21/1987 |
| 18 Prsnl HolidayElgblty | 06/16/2006 |
| 02 Appointment Date     | 02/01/2007 |
| 04 Prior PID            | 12/01/1991 |
| 07 Unbroken Svc. Date   | 05/21/1987 |
|                         |            |

18. Review the infotype and update as required.
19. Click  (Enter) to validate the information.
20. Click  (Save) to save.

Infotype Edit Goto Wage types Extras System Help

**Create Basic Pay (0008)**

Salary amount Payments and deductions

Personnel No. 40000136 Name ALLEN TOM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999

Subtype 0 Basic contract

**Pay scale**

Reason 20 Appointment Change Capacity Util. Level 100.00

PS type 01 WFSE Work hours/period 87.00 Semi-monthly




PS Area 01 Standard Progression Next increase







PS group 47 Level L Annual salary 49,368.00 USD


| Wa   | Wage Type Long Text | O | Amount   | Curre | In | A                                   | Number/Unit | Unit |
|------|---------------------|---|----------|-------|----|-------------------------------------|-------------|------|
| 1003 | Pay Period Salary   |   | 2,057.00 | USD   | I  | <input checked="" type="checkbox"/> |             |      |
|      |                     |   |          | USD   |    | <input type="checkbox"/>            |             |      |
|      |                     |   |          | USD   |    | <input type="checkbox"/>            |             |      |
|      |                     |   |          | USD   |    | <input type="checkbox"/>            |             |      |
|      |                     |   |          | USD   |    | <input type="checkbox"/>            |             |      |
|      |                     |   |          | USD   |    | <input type="checkbox"/>            |             |      |


IV 07/22/2009 - 12/31/9999 2,057.00 USD

21. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------------|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name                                            | R/O/C | Description                                                                                                                                                                                                                                                                                                                                                                                                   |
| Reason                                                | R     | <p>The reason for the change in the data on the Basic Pay infotype.</p> <p> If you do not know the number for the Reason, you can click the  (Matchcode) to open the selection list.</p> <p><b>Example:</b> 20 – Appointment Change</p> |
| Level                                                 | C     | <p>This defines the step within a range for compensation.</p> <p> Level A will default into the field for classified employees on a pay scale range. You may need to change the level.</p> <p><b>Example:</b> L</p>                                                                                                        |
| Next Increase                                         | C     | <p>This is the date of the next scheduled increase in the employee's pay and is used to override the automated periodic increment and longevity process.</p>                                                                                                                                                                                                                                                  |

|               |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|               |   |  If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency HR Processors must input the employee's current PID in the Next Increase field on the Basic Pay Infotype.<br><br><b>Example:</b> 02/01/2013                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Annual Salary | C | <p>This is the dollar amount that the employee receives as pay per year.</p>  If the employee is classified and on a pay scale range, the annual salary will populate based on the PS Group and Level.<br> If the employee is WMS, Higher Ed Exempt, Students, Non Classified Elected Official, Non Classified Exempt Management Service, Non Classified Non Pay Scale, Non Classified Board Members you must enter the annual salary in this field.<br><br> Entering the salary defines this person as Directly valued. Agencies are responsible for updating the salary when directly valued employees are due a pay increase.<br><br><b>Example:</b> 49,368.00 |
| Wage Type     | C | <p>A type of payment that separates amounts and time units for various business processes.</p>  The wage type of 1003 should default in if the employee is monthly. Wage type 1001 should default in if the employee is hourly. Enter the wage type if the field is blank.<br> You can also enter wage types for Shift Difference and Assignment Pay.<br><br><b>Example:</b> 1003 Pay Period Salary                                                                                                                                                                                                                                                                                                                                             |







22. Click  (Enter) to validate the information.

23. Click  (Save) to save.



This will mark the end of the Appointment Change action for this scenario.

24. You have completed this transaction.

| Results                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| You have changed the <b>Employee subgroup</b> of an employee to hourly when the position's <b>Employee subgroup</b> is set to monthly or change the <b>Employee subgroup</b> to monthly when the position's <b>Employee subgroup</b> is set to hourly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <p>Consider the following before maintaining an employee's Employee Sub-group:</p> <ul style="list-style-type: none"> <li>▪ The agency has hired an employee effective March 2009 and it is decided to change that employee from hourly to monthly effective June 2009. Follow this procedure to process the change.</li> <li>▪ The agency has hired an employee June 2009 and has "forgotten" to change the Employee Sub-Group from monthly to hourly during the New Hire action.</li> </ul> <p>Complete the following steps:</p> <ol style="list-style-type: none"> <li>1. Using Maintain HR Master Data (<b>PA30</b>), select the <i>Actions</i> infotype. In the Period section, select 'All' and use the  (<b>Overview</b>) function.</li> <li>2. Select the appropriate Action record and click  (<b>Copy</b>).</li> <li>3. Update the <b>Employee Group</b> field and click  (<b>Save</b>).</li> <li>4. Depending on the type of action click  (<b>Next Record</b>) button to reach the Organizational Assignment infotype.</li> <li>5. Click  (<b>Save</b>) to save the infotype. This ensures the change has taken place.</li> <li>6. Once the infotype has been saved, continue to  (<b>Next Record</b>) through the action and verify the remaining infotypes.</li> </ol> |